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Expeditie naar waarde

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2011

document version

Publisher's PDF, also known as Version of record

[Link to publication in VU Research Portal](#)

citation for published version (APA)

Kloosterboer, P. P. (2011). *Expeditie naar waarde: strategie ontdekken met professionals Theorie en methode voor strategisch leren en vernieuwen in kennisintensieve organisaties*. [, Vrije Universiteit Amsterdam]. SDU Uitgevers.

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Summary

Expedition to Value: Discovering Strategy with Professionals

Theory and method for strategic learning in Dutch knowledge-intensive organizations

This summary sets off with the power and perils of professionals and strategic learning, resulting in a problem definition for this study. After a resumé of the research methodology, the main results of the study are presented. The resumé starts with methodical conditions for strategic learning, followed by an integrative theoretical framework. Then four failure scenario's of strategic learning are summarized, deduced from strategy literature. These scenario's provide a starting point for deriving the main principles for successful learning intervention. Next, the expedition to value with professionals as a comprehensive intervention method is pictured, followed by reflections from different angles.

Hidden Potential of Professionals

Knowledge-intensive work is becoming increasingly important for our economy and society, be it in profit or non profit organizations. This brings about an ever-increasing strategic challenge in improving the ratio between costs and value for primary stakeholders.

But why make use of a learning approach? Knowledge workers solve complex value problems in daily interactions with their clients and colleagues. In these interactions valuable knowledge on problems and solutions unfolds. So, strategically meaningful knowledge and initiatives are dispersed and the problem solving potential is high. Therefore a joint learning approach to strategy is suitable for knowledge-intensive organizations. Furthermore, a learning approach to strategy is necessary for all organizations, finding themselves confronted with new external and internal conditions, to get a better understanding of their changing world and how to deal with it.

Then, how is strategic learning defined? Building upon definitions of strategy and learning by Mintzberg & Waters (1985), Argyris (1996) and Freeman (2007), strategic learning in this study is seen as: *changing patterns of activities and behaviours, resulting in an increase of (im)material value for the primary stakeholders*. These are stakeholders that an organization is directly depending upon for its existence, such as clients, financial stakeholders and the professionals in the core process. Their interests are more or less parallel to those of the organization. If the organization is performing well, they benefit. In contrast, secondary stakeholders are for instance competitors, media or pressure groups. What they do has to be taken into account, without having to create direct value for them.

But, there are problems. Despite their predisposition for learning approaches to strategy, knowledge-intensive organizations also display impeding conditions for strategic learning, varying from individual to organizational context levels (paragraph 1.4 t/m 1.6):

1 *Talent and balance?*

Professionals are talented problem solvers, but may find it hard to balance their personal characteristics and needs with their direct social working environment.

2 *Learning fear*

(Top)managers and other professionals are having difficulties with strategic learning because they find it hard doubting their deeply incorporated professional mental models (learning fear).

3 *Comfort zone*

Because of their low replaceability, professionals know relatively little survival fear, as far as their personal future is concerned. From the viewpoint of strategic learning, they easily remain in their *comfort zone*.

4 *Allergy for strategy*

Because of their relatively high learning fear and low survival fear, professionals are not very eager to engage in strategising activities.

5 *Strategy as contested zone*

- a. An achievement of the professional worker is that vertical steering mechanisms are replaced by horizontal mechanisms and autonomy. A pitfall is that this reinforces allergic reactions to everything that comes close to management. Furthermore, knowledgeworkers run the risk of growing together with their domain of expertise and sliding into solism.
- b. An achievement of the topmanager is that the strategy of the organization or unit belongs to his area of responsibility and control. A pitfall is that he does not want to share this domain with the people upon whose knowledge he is the most dependent, the professionals in the core process.
- c. The consequence of a and b is mutual negative stereotyping, inhibiting the cooperation necessary for effective strategic learning.

6 *Complicated relationships with strategic context*

Efforts in strategic learning of professionals and their managers are often (un)intentionally complicated by selective perceptions, competing interests and different and changing contexts, forms of governance and accompanying moralities.

Problem Definition

This turns strategic learning in Dutch knowledge-intensive organizations into an important but tough challenge (paragraph 1.7), also referred to as a wicked problem (Rittel & Webber, 1973). Furthermore there is only limited evidence on to which methods are effective in this wicked context and why so (paragraph 1.8). The problem definition for this study is, therefore, formulated as:

What intervention method is suitable for strategic learning in Dutch knowledge-intensive organizations?

The research questions that should lead to answering this problem definition are:

- 1 Which methodic conditions influence strategic learning in Dutch knowledge-intensive organizations?
- 2 What are the relevant mechanisms in strategic learning and how can they be brought together in a comprehensive theoretical framework?
- 3 Which intervention principles enhance (the methodical conditions for) strategic learning in Dutch knowledge-intensive organizations?
- 4 What is the relevance and contribution of the answers found in the first three questions regarding the theory and practice of strategic learning?

This study approaches strategic learning with professionals and their managers neither as planned change, nor as improvising. It is approached as a methodic expedition to value creating practices and strategies. Methods of interactive exploring and discovering generally appear to be more effective in this respect than planned change approaches (Werkman, Boonstra & Elving, 2005; Van Delden 2010; Laar & Kaal, 2010).

Research Methodology

This study takes a pragmatic stand towards knowledge, which presupposes a direct relationship between knowledge, action and personal experience. This implies that intentionally engaging in interactions with the surrounding context can bring about new knowledge.

The research characteristics are qualitative, theory building, case study, clinical design-oriented action research. Eisenhardt & Graebner (2007) conclude that this kind of case study research is the best way of bridging rich qualitative research in the subjectivistic tradition and mainstream deductive research in the objectivistic tradition.

Characterizing this study as clinical design oriented research is relevant for two reasons. First, in this specific research the process knowledge concerns the design of interventions that instigate strategic learning. According to Van Weert and Andriessen (2005), the most feasible in complex everyday practice is the use of heuristic rules. Secondly, a T-shaped research design is applied, starting with a broad exploratory part of the study, followed by an in depth testing-oriented part of the study. The reflections on the cases in the in depth-study are tests for the applicability of the design principles (and evaluation criteria) for interventions in favour of strategic learning, which, in turn, lead to improvements of those principles.

The exploratory part of the research consists of four cases derived from my consultancy practice (retrospective action research) in chapter 3 and a literature study in chapters 4 and 5. In both researches, first and second order learning processes are contrasted as part of a theoretical sampling research strategy (Eisenhardt, 1989). In the empirical part, two cases of first order strategic learning are compared with two cases of second order strategic learning. The first two cases concern a government service organization and a media concern. The second two cases regard a pharmaceutical research unit and a hallmark institute. Based on mutual comparison of the cases, methodical conditions for strategic learning are extracted as sensitizing concepts.

The literature study in chapter 4 brings together the learning mechanisms for second order learning in a two-dimensional frame. Chapter 5 integrates these and other insights into a theoretical model of strategic learning. The subsequent literature study in chapter 6 is oriented at the mechanisms that limit strategic learning to first order processes. This results in four design principles for interventions concerning strategic learning, positioned in the earlier derived integrative model for strategic learning.

All in all five of the six studied cases are based upon action research (AR) material. In AR the researcher/interventionist contributes to immediate problem solving and to scientific theory building (Rapoport, 1970). It is extremely suitable for tracing tacit knowledge, including that of the researchers themselves (Eden & Huxham, 1996; Vermaak, 2009). Bias and subjectivity are major threats to the validity and reliability of AR. According to Argyris (1992), it is better not to cover up for this but to make underlying assumptions explicit. The theoretical framework presented in this book is an attempt to do so. So is the continuous comparison of empirical data and theoretical concepts (Verschuren & Doorewaard, 2000; Coenders, 2008). Furthermore, triangulation of sources and methods is applied in the in depth-studies by validated interviews with all members of the strategy groups before and after the strategy process; participative observation, documented in case journals of the researcher and key participants, with separate registration of facts and events versus personal feelings and interpretations; desk research of strategic documents and finally a member check of the draft case descriptions (Coughlan & Coughlan, 2002; Yin, 2003). In the second in depth case, a three day strategy workshop has been

recorded on video.

Methodical Conditions for Strategic Learning

The answer to the first research question concerning methodical conditions for strategic learning is mainly provided in chapter 3 as an inductively derived set of sensitizing concepts summarized in table 1.

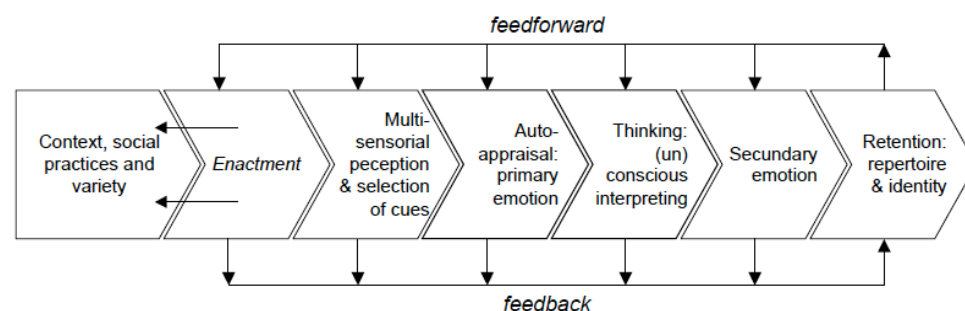
Starting conditions	1 Strategic context: perceived urgency by leadership 2 Learning leadership: questioning strategic logic, containing learning process 3 Strategy team: vital coalition
Process conditions	4 Timeliness a. mobilising strategy team b. consulting professionals 5 Ownership professionals by enhancing actorship on: a. strategy content b. strategy process 6 Exploring sources of: value perception (primary stakeholders), value creation (professional practices) and value potential (inspiring people and places) 7 Dynamic working procedures 8 Incubation- and processing intervals 9 Emerging perspective as attractor
Conditions for execution	10 Shortcyclic feedback on decisions and execution 11 Learning and coproducing setup of execution

Table 1: Methodical minimum conditions for strategic learning

Integrative Theoretical Framework

The response chain is central to the theory of individual learning as proposed in paragraph 5.3.1 (figure 1). Elements of four main approaches to (strategic) learning are integrated in this concept: constructivism, individual physiological theories, evolutionary theories and social constructionism.

Figure 1: Individual response chain



Individual response chains weave into patterns and socially they interlock as practices. The response chain provides insight into the basic connections between enactment, perception, feeling and interpreting and how these affect strategic learning. The response chain for instance illustrates that we always perceive an enacted reality and that our thinking is always heavily coloured by selective perception and primary, 'precognitive' emotions.

Individual learning can be seen as (re)forming response chains and connected patterns of these chains (paragraph 5.3.2 and 5.3.3). The criteria for this (re)formation are:

- 1 **Functionality:** The response chain provides (surviving) advantage, wellbeing or pleasure and therefore fulfills basic needs. The fast, limbic centered X-system controls responding on direct functionality. The slower neocortical C-system manages our responses in the light of indirect functionality.

- 2 Plausibility: the more plausible the consequences of a response pattern, the more we are inclined to respond accordingly.
- 3 Congruence: The brain strives for congruence and consistency between doing, seeing, feeling and thinking.
- 4 Efficiency: earlier experiences embedded in repertoire and identity help us selecting data and cues from the richness and variety surrounding us.

Four constituting processes, accountable for unlearning and differentiating existing response chains and patterns and preceeding the formation of new ones, are (paragraph 5.3.3):

1. Attention: Focus on unlearning cues related to existing response chains and patterns sets off doubting these response patterns.
2. Comparison: This goes for the perceived consequences of change or no change, now or later, together or alone and so on. If the bottom line is negative for the status quo, this results in an emotional triggerpoint, followed by readiness for learning and changing (paragraph 4.5.3 and 4.5.5).
3. Contemplation: New cues and cuesets are better admitted and processed to new response patterns in a relaxed state of contemplation (heart-brain synchronisation). Pain and fear result in fixating response chains and in regression into primitive fight-flight responses.
4. Repetition: Alternating attention, comparison and contemplation enables more complex and deeper reforming of response patterns.

Based upon the criteria mentioned above, different forms of learning can be distinguished in an increasing order of depth (paragraph 5.4):

- 1 *Conserving* in its most simple appearance is routinising successful responses. Fixating is intensifying and refining the existing response repertoire in order to suppress distracting contextual variance.
- 2 *Modifying* means rearranging the connection between a behavioral response and a contextual cue. Unlearning is the process of disconnecting and acquiring is the process making a new connection.
- 3 *Accommodating* on a cognitive level means understanding cause and effect relationships in the environment. On an affective level it means empathy for other people or situations. Accommodating enables mentally comparing response logics and is therefore a corridor to learning on a deep level.
- 4 *Processing* as deepest form of learning takes place at the level of identity. Changing the deeply rooted response logics of a person or group requires passing a triggerpoint (paragraph 4.5.5). Unblocking helps processing earlier events and integrating them into the identity of a person in a natural way. Discovering means recalibrating an existing response logic and accompanying emotions by fully processing important immediate unlearning experiences.

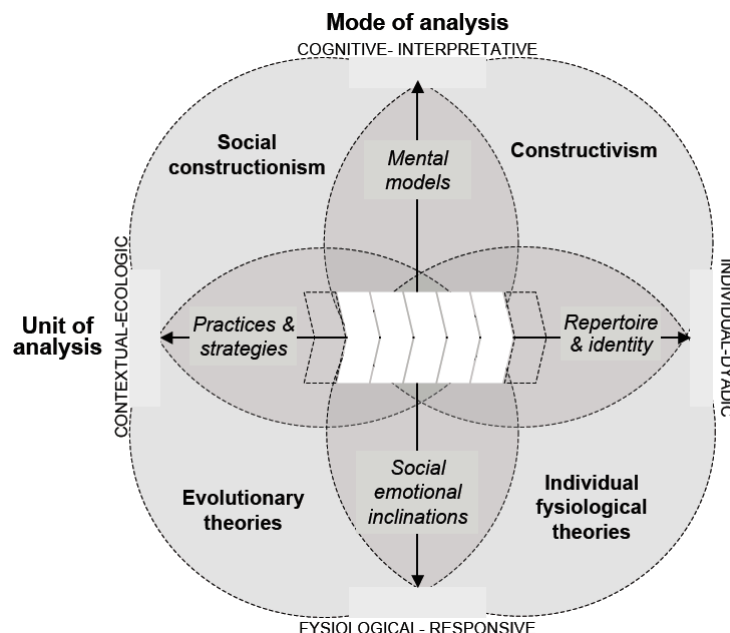
Conserving as well as modifying are basically reactive ways of learning. Accommodating and processing generally demand active efforts to move beyond familiar response logics.

Integrative model of strategic learning and learning space

To make the step from individual to strategic learning, an integrative model of strategic learning is proposed (paragraph 4.2, 4.3 and 5.5.2). Four main approaches to strategic learning are described: constructivistic theories (paragraph 4.4), individual physiological theories (paragraph 4.5), evolutionary theories (paragraph 4.6) and social constructionistic theories (paragraph 4.7). Two underlying dimensions are identified to clarify similarities and differences. Cognitive-interpretative theories assume that constructions of meaning and mental models determine behaviour. Physiological responsive theories describe and account for social emotional inclinations. Contextual-ecological approaches define organizing as transactional, resulting in recurring practices and strategies.

Individual-dyadic theories explain retention and reproduction of behaviour by means of individual repertoire and identity. At the heart of the overlap lies the response chain. The model is worked out in detail in paragraphs 4.3 till 5.5 and is visualized in figure 2.

Figure 2: Four approaches of strategic learning, four mechanisms of retention and the response chain pictured on two dimensions



An effective method for strategic learning provides enough learning space for activating four motors of strategic learning and change (paragraph 5.5.1):

- unlearning signals, variance and conflict (without premature reduction) starts up the dialectical learning motor of social constructionism;
- reflection on validity and functionality of assumptions, response patterns and practices allows conscious choice for new and better reasoning in pursuit of desired consequences is key to the teleological learning motor of constructivism;
- shared attention, synchronicity, relaxed contemplation, trust and unity reduces learning fear and triggers a new lifecycle of physiological response patterns;
- experimenting and evaluating new practices and strategies in their functional context activates evolutionary competitive selection as part of the learning process.

Failure Scenario's of Strategic Learning

In chapter 6, four archetypical failure scenarios are deduced from literature on strategy seen through the lens of strategic learning:

1. Dynamic conservatism: Lots of energy put in the strategy process, but more of the same comes out (Schön, 1967);
2. Superstitious strategies: aircastles and suboptimal practices as a result of invalid assumptions (Levitt & March, 1988)
3. Drawing table strategies: Sound story, but it does not 'land' (Mintzberg & Waters, 1985);
4. Lost strategies: Valuable strategies from the professional grass roots that do not find recognition and/or acknowledgement in the organization (Argyris & Schön, 1996; Mintzberg, Ahlstrand & Lampel, 1999).

These failure scenarios often manifest themselves in combined ways.

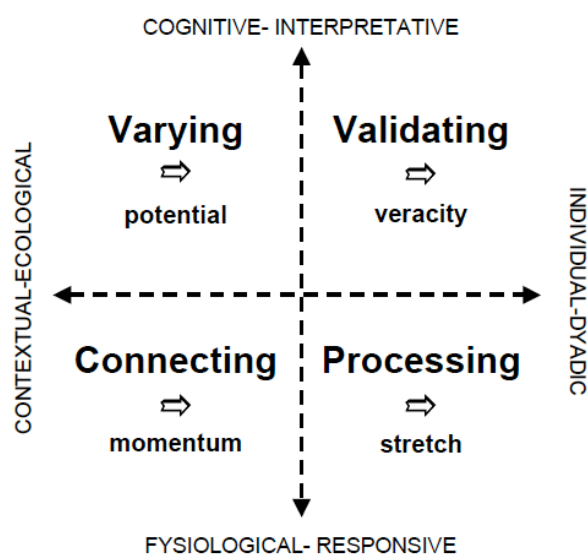
Deriving Principles for Successful Intervention

Each failure scenario can be seen as resulting from a shortcoming in the process of strategic learning. Thus, four underlying design principles are derived to enhance successful strategic learning to be applied simultaneously.

1. **Varying:** diversity in data, lines of reasoning and participants increases the regulative potential of strategists and their strategy products. Variation in the process by unorthodox interactions, activities, experiments and physical movement further strengthen the strategic potential. Variation activates the dialectical learning motor of social constructionism.
2. **Validating:** This is about testing assumptions and interpretations during the process of strategic learning (validity of strategic data, stakeholder opinions, mental models; validity of strategies by pilots, prototyping, simulations or validity of trust in the effectiveness of the process). Constant validating activity enhances the veracity of strategy content and process and improves the quality of constructivistic teleological reasoning and learning.
3. **Processing:** Strategic stretch is the result of cognitive and emotional processing. It requires repeated attention, contemplation and comparison. Generally this processing takes some time until a triggerpoint is reached, which leads to more fundamental reflection and action. Exploring consequences of current practices and alternatives enhances deep learning, as well as a feeling of self-determination and trust in the leadership and the learning situation. Deep processing sets off a new lifecycle of physiological response patterns.
4. **Connecting:** This is about the connection of theories espoused and in use, the connection among internal stakeholders and the connection between internal and external stakeholders. It concerns activities that enhance synchronous learning in the whole organization resulting in coherent action and increasing strategic momentum. Connecting knocks out evolutionary competitive selection of strategies during implementation by timely anticipation on and integration of selection criteria.

The four learning principles in figure 3 are positioned upon the same dimensions as the approaches of strategic learning in figure 2.

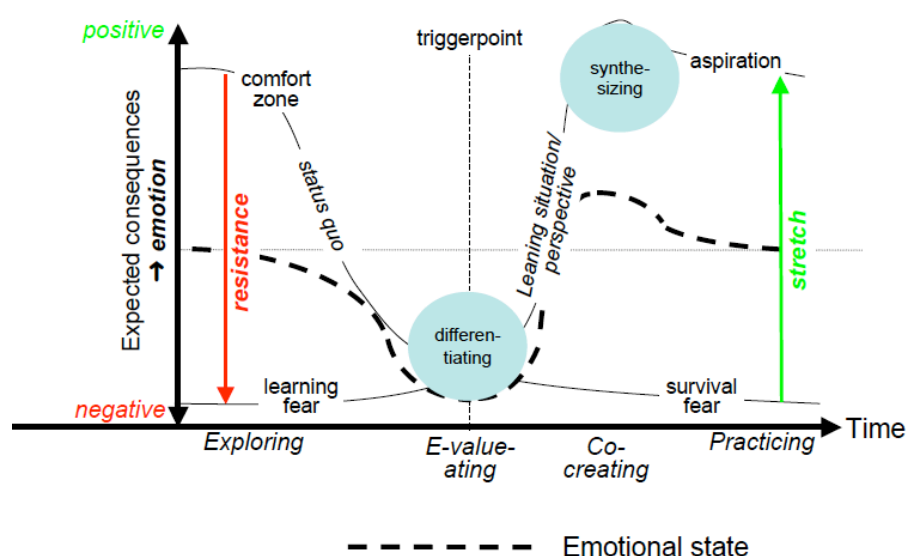
Figure 3: Four learning principles and their effects on two dimensions



Expedition to Value

In chapters 7, 8 and 9 the 'expedition to value' is developed as a set of intervention principles for second order strategic learning in knowledge-intensive organizations. The heart of the underlying reasoning rests upon two foundations. The first is the continuous and synchronous application of the four principles for strategic learning. The second is the chronology in the deep learning process (paragraphs 4.5 and 8.7.2.4), visualized in figure 4. Emotion during strategic learning appears to be the dynamic bottom line of two parallel psychological evaluations: expected consequences of learning (i.e. learning situation/ perspective) and expected consequences of not learning (status quo).

Figure 4 Emotions during strategic learning



These two foundations define the vertical and the horizontal axis of the intervention frame for successful strategic learning in table 2.

(0) Preparing	Exploring and preparing methodic conditions for expedition: • Expedition leadership: Question (dominant logic) and contain (learning process) • Expedition guide: Complementary and congruent • Expedition team: Vital coalition • Expedition principles: 1a t/m 4d Testing and shaping to psychological and formal contract			
Phase Learning-principle	(1) Exploring value	(2) E-value-ating	(3) Cocreating value	(4) Practicing for value
a Varying → potential	1a Enriching context	2a Immersing	3a Atelier	4a Experimenting
b Validating → veracity	1b Exploring sources of value	2b Co-reflecting on practices	3b Concretising	4b Shortcyclic testing value
c Processing → stretch	1c Short learning cycles	2c Triggering	3c Discovering	4c Acting at once
d Connecting → momentum	1d Mobilising	2d Resonating	3d Appreciative connecting	4d Coproducting
Process- result	Renewed frame of reference on value and trust	Shared motive for cocreating strategy	Joint discovery strategic perspective	Valuable practices and strategies

Table 2: Expedition to value, intervention principles for strategic learning

Below the joint application of the expedition principles in the right chronology is summarized referring to the phases specified in table 2.

0 Preparing

The preparing phase is the first scene for testing and adjusting of ambitions and expectancies about the expedition to value. On the one hand, this is about the complementarity and congruence of the interventionist. Is he or she the right role model with the necessary complementary qualities for an effective process of strategic learning? On the other hand, there is the issue of the capability and true intention of the *general manager* to stand tall for a process of deep learning (see learning space criteria), including rigorous realisation of the outcomes and his or her personal learning process.

Finding agreement upon the composition of the strategy team (including members of dominant and innovative coalitions) and other expedition principles is a learning process in itself for the expedition leadership and expedition guide. It also provides a barometer function for the expedition to come.

1 Exploring value

In the phase of exploring value, managers and professionals explore sources of value and the strategic context. Primary stakeholders are sources of value perception, professionals are sources of value creation and inspiring persons and places can be sources of value potential. Key is validating and understanding the strategic context in which value manifests and develops itself. Next, it is important to share the revenues of these explorations intensively and provide the opportunity for these impressions to incubate and be processed. In doing so, relevant learning experiences grow, as well as trust in the expedition principles and in each other, which enables to move deeper and deeper into the challenging process of strategic learning.

2 E-value-ating

The aim of the e-value-ating phase is to reach an intersubjective validated overall picture of current and expected value creation, in case current patterns of activities and behaviours would roughly be continued (paragraph 6.3.2). Furthermore, the aim is to reflect upon the practices and patterns causing and reinforcing the strategy-in-use. Emotionally it is about fully realizing the organizational and personal consequences of the situation. This enables a fair comparison of learning emotions: fear and longing for change and no change. The expedition team arrives at the 'place of effort', where there is an intense need for a new 'dominant logic', which has not yet arrived. The wider this is shared among managers and professionals the better. When consequences of no change are serious enough, they create a shared motive and a launch pad to change. If not, a non liability scenario is most likely to unfold (paragraph 5.2.2).

3 Cocreating value

In the phase of cocreating value all the stored cues on ecological change and the urge to break out of the 'place of effort' is addressed. Interventions for the strategy team aim at cocreating a highest future possibility referring to practices and strategies with the highest possible value for primary stakeholders. Emotionally and processually it is about creating a generative flow of energy and ideas, while cocreating a strategic perspective. The produced image enhances identifying and incorporating valuable practices, already present in the organization. It also encourages to newly develop only what cannot be found as a germ seed in the organization already.

4 Practicing for value

Practicing for value addresses the double meaning of the word practicing - simultaneously executing and exercising. Prototypes and valuable practices of professionals and managers need instant execution, shortcyclic testing on their value for stakeholders and further developing prototypes and capacities along the way. As the opportunity rises, new practices are to be embedded in the regular planning- and control cycle.

Practicing ensures quick irreversibility of the general change direction and concentrating on further developing and optimising it. Coproducing with primary stakeholders, continuous learning and involving more and more professionals, contributes to increasing energy and strategic momentum.

Reflections

Two systemic logics of change

The expedition to value starts with exploring and validating strategic value. Experiences during these explorations serve as building blocks for a new frame of reference. Comparing this to old frames of reference can cause distraction. When people in a social system find out their practices and mental models become less functional in their context, the system moves away from equilibrium (paragraph 1.7). This process of collective unlearning is referred to as the logic of distraction, which precedes a process guided by a logic of attraction.

Cocreating a promising future, based on requisite variety, differences and unlearning signals creates a new point of attraction, towards which a group in distraction will move. In the literature this is referred to as self organizing according to a logic of attraction (Wierdsma, 1999, Weick & Quinn, 1999).

The expedition makes deliberate use of the logics of distraction and attraction with the value assessment as the validated nexus of both logics.

Theoretical reflections

The downside of the theoretical model is that the contextual ecological mechanisms for strategic learning are less comprehensively elaborated upon than the individual mechanisms, detailing the response chain model. Though the four principles for strategic learning are an attempt in this direction, there is still an ample opportunity for future research.

Positioning the proposed theory against the schools of thought on strategy (Mintzberg, 1999; Volberda & Elfring, 2001) it clearly belongs to the learning and cultural schools. There is little relationship with the design-, planning- and positioning schools and some overlap with the other schools of thought.

Finally, in an epistemological reflection it is observed that the pragmatic stand to knowledge has shifted during this study to what is called embodied realism.

Methodological reflections

The most important observation is that case study research has the advantages of being fairly precise and relatively unambiguous, but that it is hard to generalize conclusions. This goes for this study as well as any case study research. On the other hand, complementary measures have been taken in order to counter this disadvantage, such as integrating the theory and results into a wide range of international literature and theoretical sampling of cases and of approaches in the literature.

Yet, it is concluded that the expedition to value first of all needs more case study research in different contexts and with different interventionists before a more quantitative approach of testing even comes near.

Furthermore, some concepts may have got lost in the process of axial coding and may be worth exploring, such as the role of interventions enhancing or repairing trust. Finally, it is worthwhile to improve the structural conditions in knowledge-

intensive organisations that enhance strategic learning, which may, at least partly, replace some methodical conditions for strategic learning.

Personal reflections

Language can be an unintended source of mislearning. Therefore the similarities and differences among some of the most important concepts of this study are clarified: strategy, culture and different forms of learning (individual, organizational and strategic). Amongst others, it is concluded that culture can be seen as a subdomain of strategy.

Language can also create mislearning in intervention practice, if a newly introduced logic is not readily accompanied by an embodied experience. The power of language in theory of (strategic) learning does not so much seem overrated, but the power of emotion *does* seem underrated in this area of research.

It is concluded that the continuous brain activity of self referential comparing and emotionally valuating experiences is at the heart of human learning activity.

Practical reflections

In modern times of high organizational density and real time communication it is often more rewarding to support and reinforce grass-roots initiatives to strategic change than to make use of a traditional, centrally-led approach. The latter may all too easy turn into a bureaucratized and politized change attempt, thus becoming an obstacle to change itself.

However, sometimes the urgency for strategic change is too high to wait for decentral initiatives to emerge. It is in these circumstances, as long as it has not developed into an acute crisis, that a strategic expedition to value may offer the right alternative for strategic learning. Under the pressure of such circumstances there is a huge challenge for the expedition guide and the expedition leadership not to surrender for the temptations of taking a 'shortcut'. The cases show that every methodical trade off that has been made, had a price that, in hindsight, all of the expedition leaders regretted.

This does not imply that the vitality of a strategy team is completely depending upon a collective eagerness to learn by all members. It is primarily determined by the extent to which a general manager genuinely strives for strategic learning.

The value diagnosis intervention has shown to be effective in enhancing the collective engagement for strategic learning. It pictures the validated positive and negative revenues of the transactional relationships between the organization and its primary stakeholders. Each 'value' results from dynamic patterns, practices and strategies. These patterns contain the concrete hook ups and germ seeds to change. This differs fundamentally from a SWOT-analysis, which judges for general, static characteristics and, worst of all, generates superstitious, invalid strategies (Hill & Westbrook, 1997).

Finally a warning is given against 'productification' of the expedition to value. It is not the method that guarantees results, it is the genuine and burning intention of the leadership to learn that ultimately counts. The expedition method can only be an instrument to the right intentions; it cannot create them.